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## Extracting Leadership Knowledge from Formative Experiences

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**Abstract** *Leadership formative experiences (LFEs) are those experiences that make a high impact on leaders resulting in learning relevant to their leadership. This intervention was designed to capture LFEs through bi-focal lenses of leadership research (explore the process by which leaders build and share knowledge) and development (raise participants' awareness of self and others to shape effective leadership interventions). Senior leaders participating on a leadership development programme recounted LFEs in peer groups to surface their learning. Most LFEs occurred in adulthood (76%) identifying 'self-improvement' (40%), 'coping with struggle' (33%), 'personal relationship/role model' (13%) and 'parental/symbolic relationship' (5%) sensemaking categories. Only 8 per cent addressed a 'natural process' supporting a 'born leader' view and 1 per cent involved identification with a cause. Experiences powered 'from within' in pursuit of self-development were more effective in extracting lessons from LFEs than where learning occurred through coping with adversity. The research details LFE impact located in the social construction process embedded in micro-interactions of leaders with those they help develop.*

**Keywords** *development; leadership; management; leadership formative experiences*

### Introduction

Much leadership research focuses on the impact leaders make on their followers, their organizations and society at large (Hernez-Broome & Hughes, 2004) but there is a dearth of empirical work that addresses the antecedents of leadership at play in leadership development (Avolio & Gibbons, 1988). This article focuses on the impact of specific formative experiences on the development of leadership capacity. We define leadership formative experiences (LFEs) as those experiences which make a high impact on leaders, resulting in learning relevant to their leadership. We study experiences that have shaped an individual's leadership development as he or she develops self-concept and awareness of context. We aim to find out how some experiences, out of all experiences incurred in life, stand out as being formative for leadership development, how they are remembered, and how they are processed by leaders to extract the substantive lessons for them to apply to the future. Organizing their life

events into a coherent whole, they develop their leadership identity and make sense of the leadership actions they take through their life story (Shamir & Eilam, 2005).

## Theoretical milieu for the study of formative experiences

All the major theories dealing with learning and developmental psychological processes explicitly or implicitly place experience at the centre of the learning process. For example, the learning theories generally identified with Skinner (1989) are based on the 'law of effect', in which behaviour is guided by past results. If certain behaviour was rewarded in the past, this positive reinforcement increased the probability for that behaviour to recur while behaviours that are not rewarded will probably appear less and less and may even disappear.

Components of self-efficacy also develop on the basis of experience. Bandura (1977), for example, showed that the sense of success based on experiences in certain areas led to the strengthening of self-efficacy in those areas. These principles have proved relevant and applicable in the area of leadership development. For example, Akin (1987), Kotter (1988) and McCall et al. (1988) reported that managers retrospectively viewed practical experience as a cardinal learning experience in their development as leaders. Successful experiences in leadership roles, whether in the family, educational or social frameworks, not only showed individuals that they are perceived by others as leaders – they also strengthened their own belief in their leadership ability.

Leaders' testimonies also reveal that personal experience was an important element in their learning of leadership (Day et al., 2004; Kempster, 2006; Kotter, 1988). Atwater et al. (1999), seeking predictors of leadership, examined a large number of mental and physical characteristics of freshmen at a military academy. They found that past leadership experiences and self-efficacy differentiated levels of leadership most clearly. That is, students with a rich background of leadership experiences and high self-efficacy were rated with the highest level of leadership. Similarly, Hall et al. (2004) found in a longitudinal study of leadership that West Point cadets who had more leadership experiences at high school had higher initial leadership performance at West Point.

Lord and Hall (2005) argue that leadership development via experiences can be described in terms of qualitative changes in both process and knowledge as skills develop from a novice to an expert level (e.g. Ericson & Charness, 1994). These changes involve the development of a large repertoire of more targeted, domain-specific productions rather than the development of general heuristics that are applied to all superficially similar situations. Moreover, in addition to guiding behaviours and social perceptions, this experience-based knowledge of leadership becomes, over time, inextricably integrated with the development of one's self-concept as a leader.

While the above shows that there is a general agreement among researchers that leadership experiences are a major route in the development of leaders (e.g. Avolio, 1999, 2005; Day, 2000; London, 2002), this connection is essentially presented in terms of contribution to a leader's quality of performance (e.g. Atwater et al., 1999; Lord & Hall, 2005). That is, it provides an accumulation of knowledge and awareness that serve the leader's functioning.

What has been largely missing in the literature has been an investigation of the

inner reflective processes (Schon, 1987) that create these 'end results'. There have been some recent attempts to address this area (Kempster, 2006; Popper & Maysseless, 2003). Kempster (2006), for instance, interviewed six directors using grounded theory approach (Parry, 1998) to explore how leadership was learned. The findings map the different forms of natural learning and highlight the prominence and importance of these naturalistic influences, but no attempt is made to discuss or identify the reflective processes underlying the formation of the learning categories. Given the centrality scholars place on experiences for learning and development, the present study addresses reflective processes that surround leadership experiences, if indeed they are to be looked at retrospectively as formative.

Two of the major theoretical approaches framing studies of reflection on leadership experiences, particularly on formative leadership experiences are the lifespan approach (Avolio & Gibbons, 1988) and the life-stories approach (Shamir & Eilam, 2005). The former focuses on identifying actual events as formative and the latter emphasizes the meaning attributed to events as the major factor mediating its formative impact.

In the lifespan approach Avolio and Gibbons (1988) mention a mix of family factors (from predispositions resulting from parental encouragement through to the influence of the family's distribution of resources), to context (leadership opportunities in various settings, including formal and informal leadership and personal development occasions) to individual factors (how each individual learns to deal with and balance their emotions, how strongly they want to engage in developmental work later and how they reflect to integrate life events to open up new possibilities for themselves). Luthans and Avolio (2003) identify actual events that are retrospectively described as having contributed to leadership development. In this view 'triggers' (critical events) can foster the conditions that encourage leadership development. Trigger events can be either positively (a promotion) or negatively charged (becoming a caretaker for a critically ill parent). Luthans and Avolio analyse these trigger events to understand the factors promoting leadership growth.

Judgements on what constitutes a formative experience will necessarily be subjective allowing for their relative impact to be appraised. Shamir and Eilam's (2005) life-stories approach emphasizes the interpretation that people make and the meanings they ascribe to their experience over the facts of the events themselves. Such a view accepts that leaders will necessarily make choices about which events they detail and expose as having developed their leadership. The authors propose that authenticity components of the leadership such as trust, confidence, hope, intimacy (George, 2003) are located in the relationship between leaders and followers.

## **Formative experiences narratives as individual constructions**

Leaders' formative experiences play an important role in shaping and reinforcing leaders' identity. In addition, a leader's level of self-awareness as to the formative value of past experiences may vary and some of these experiences may have been consciously or unconsciously blocked out. This may raise questions about the 'authenticity' of research material recollected from the distant past debating whether it is more important to achieve an exact reconstruction of their LFEs or reach a deeper

understanding of how these leaders made sense of and constructed their experience when it happened and while they remember it. Shamir and Eilam (2005) argue that the narratives of formative experiences are a representation of individuals' internal 'meaning systems' from which reality is interpreted and given personal meaning. According to them, the events and experiences chosen by leaders to appear in their life stories reflect the leaders' self-concept and the concepts of leadership that enable them to enact their leadership roles. They looked at two different types of life stories: leaders' published autobiographies from the political, military, and business spheres and interviews with 16 participants in an intensive leadership development course. Based on their empirical study, they classify leadership life stories into four categories: leadership as a natural process, a result of struggle, a finding of a cause, or an experiential learning. Shamir (2005) noted the need for empirical studies involving larger data sets and multiple coding sources in the study of leadership life stories.

Gronn (2005) expressed concern that autobiographies may be utilized to showcase particular leaders in favourable ways with little resemblance to historical evidence. Responding to the allegation that leaders' life stories are mere propaganda and of no empirical value, Shamir (2005) replied that the impression management function of a leader's life stories is no reason to dismiss them, first because this function is a legitimate and important area of study and second, because the propaganda aspect is only part of the story, not the whole story.

Shamir (2005) also stated that methods other than historical biographies can make useful contributions to leadership knowledge. Understanding the stories leaders tell followers (and themselves) about their past experiences can provide valuable insight into which experiences leaders consider formative, and why. This is particularly relevant because the impact of a formative experience on a leader depends more on the meaning the leader can make of it rather than on the experience itself and because this knowledge can further help leaders develop new leaders. This approach is also consistent with the logic of sense making processes suggested by Weick (1995).

## Leadership formative experiences in context

The contextual influences that can impact on formative experiences arise from a wide range of dimensions. Widespread societal influences, for instance, include national events that impact on whole generations of leaders (Li, 2003; Tessler et al., 2004). It is only in certain cases, when generational effects involve major collective experiences undergone by contemporaries that the attribution of these experiences as collectively formative may be possible. In most cases, however, it is not possible to attribute collective experiences as having had similar formative experiences in entire generations. This is important when we consider that what matters in leadership formative experiences is the meaning leaders make of experiences rather than the experiences in and of themselves, thus two leaders could undergo the same experience but take away different meanings from the experience, resulting in differing effects on leadership capabilities. On the other hand, contextual influences include interpersonal dimensions rooted in interactions with others from either professional or non-professional circles (Kegan, 1982). Given the relative rarity of generational effects, the study of relational factors offers more promising directions for researchers of leadership formative experiences. Other than the

aforementioned literature on attachment that predicts interpersonal and organizational behaviours as follow-on to certain childhood experiences, there is little research on how leaders would describe formative experiences in relational and organizational contexts.

Bennis and Thomas (2002) called the experiences that shape leaders 'crucibles' and defined them as transformative experiences through which these individuals came to a new sense of identity. These experiences were tests that involved deep self-reflection that forced them to question who they were and what mattered to them. Schon (1987) argues that reflective learning is especially relevant to learning from experiences that are complex, happened 'then and there' and not necessarily 'here and now' simulations. Indeed, the reflection on crucible experiences forced the leaders interviewed to examine their values and question the rationale underlying their actions. Issues such as racial and religious discrimination create challenging situations that people are forced to deal with; meaning making of and learning from negative circumstances is a process which is specific to individual leaders. Bennis and Thomas (2002) interviewed more than 40 top leaders in business and the public sector over a three-year period and stated that all of them, young or old, were able to point to intense, often traumatic, and always unplanned experiences that had transformed them and had become the sources of their distinctive leadership capabilities. Not all formative experiences were traumatic, however; they included positive but very challenging experiences such as having a very demanding boss.

Addressing the issue of leaders' capacity to withstand stress, Khaleelee and Woolf (1996) argue that the capacity to tolerate uncertainty, both one's own and that of followers, is a critical element of leadership. The larger and more complex the enterprise and the more responsible the position in it, and the greater the time-span of uncertainty, the greater the required capacity of the leader to live and lead within this. This capacity, they contend, is a function of the individual's emotional development and emergent pattern of defences. They suggest that the demands and frustrations of life experience contribute to the development of the defence mechanisms that affect the capacity of the individual to remain stable under stress and tolerate the uncertainties required in leadership positions. Khaleelee and Woolf propose that resilience comes about through life experiences and the formation of defences, determining the leader's capacity for tolerating ambiguity. They see resilience and the capacity to contain anxiety over a long period of time as being attributes critical to most definitions of leadership.

Gardner et al. (2005) note that most trigger events considered in the literature have been viewed as negative and involving some kind of crisis. They contend that positive role models and trigger events can also help raise self-awareness of developing leaders. Using a strength-based model Avolio and Luthans (2005) contend that successful leaders build strength by tilting the balance between negative and positive moments that life presents to them whether planned or unplanned. Based on the principle that developing strengths is a more potent and productive approach than remediating weaknesses, they choose to emphasize positive 'trigger events' to understand leadership development in their research. Trigger events are events that could either appear important or negligible at the time but when seen in retrospect, the insights they brought upon us surface an important learning value. The latter becomes actionable when insights are reflected upon. Hence, virtually any moment in time

could become a key moment that fundamentally shapes our future. Hence, an examination of trigger events can assist in understanding what promotes the growth of leadership (Luthans & Avolio, 2003). High-achieving individuals appreciate the value of these key moments and use them to develop their full leadership potential. Recognition of 'moments that matter' is an essential step in the acceleration of leadership development as proposed by the authors.

As seen earlier, there are radically different lenses through which the phenomenon can be viewed. One of our aims is test whether positive or negative experiences most contribute to leadership learning while adding to the extant classification of leadership formative experiences.

## Methodology

Parry (1998) described grounded theory as particularly apt for analysing leadership phenomena since they are rooted in social processes. The grounded theory methodology integrated data collection and data analysis into a process of constant comparison (Strauss, 1987). The data analysis process therefore focused on generating categories and their properties and then sought to appraise how these categories were represented throughout participants' accounts.

To this effect, it was necessary to carry out the research in three iterations, focusing on different parts of individual experience to appreciate differences between and within contexts (Berger & Luckmann, 1966) and the specific interpretation of experiences by their owners/bearers. Drawing from grounded theory (Strauss & Corbin, 1998) the data were organized from a social constructionist perspective (Berger & Luckman, 1966) into common themes. Themes were derived from the examination of discursive texts (transcripts) for their normative patterning and symbolic structuring (Geertz, 1983) in the first data collection episode, and from solicited reflections about contexted interaction (Collier & Thomas, 1988) in the second data collection episode. The latter were derived from informal discussions between peers at the time these experiences were shared together, along with the original oral descriptions of the experiences themselves.

The second data collection was designed to generate code for basic story characterization, by surfacing the meaning-making activities that mediate the lessons learned from experience. To begin this process, participants identified one area of potential desired leadership improvement and worked back to identify antecedents and emotional climate around the chosen area to facilitate a change process via a narrative methodology (Janson et al., 2006; White & Epston, 1990). Themes were not pre-constructed for the participants. The thematic construction process did not adhere to Strauss and Corbin's (1990) rigorous coding protocol because it was important to avoid what Glaser (1992) describes as 'forcing' rather than facilitating the 'emergence' of data. Hence, the thematic construction process happened retrospectively by the researchers and allowed for the themes to emerge through the voices of the participants as they related their stories and experiences reinforced by the peers' inquiry.

The third data collection episode was designed to understand in more depth the impact of emotional factors in formative experiences. As a result of participants' group discussions, an emotional valence factor was coded for focus of overall connotation. Namely, even if the story was about how an injury taught someone a positive

and powerful lesson, it still had a negative connotation and thus was classified as such. At this third and final data collection iteration, a double feedback methodology was designed to address the limiting factor of meaning making done strictly by a researcher (Shamir, 2005). It consisted of a combination of peer and facilitator feedback whereby initial categorization was shared with a sub-group of participants and their feedback sought towards further category refinement (Zorn & Ruccio, 1998). The double feedback methodology was cross-referenced with participants' reflections about their learning taking into account the feedback they received. Thus it was possible to grasp the significance participants ascribed to their experiences with a greater degree of accuracy.

Coupled with the aforementioned qualitative methodology, quantitative data analysis was carried out, strengthening Parry's (1998) point that the combination of qualitative and quantitative methods to collect and analyse research data can indeed enrich the leadership research process. As noted, these ideas were integrated into one research stream, following Eisenhardt's (1988: 539) remark that an iterative process, whereby data collection and data analysis overlap, allows for some advantages: '[it] not only gives the researcher a head start in analysis, but more importantly allows researchers to take advantage of flexible data collection. Indeed, a key feature of theory-building . . . research is the freedom to make adjustments during the data collection process' (quoted by Orlikowski, 1993: para. 18).

## Participants

All participants were sponsored by their organizations for advanced leadership development, having demonstrated leadership prior to their enrolment in the programme. As data collection happened in three stages to allow for an iterative process of data collection and theory building, both sets of results will be detailed later.

In the first data collection episode, 17 participants were asked to reflect on their life and identify three key events/moments/experiences that they believe have had a big impact on shaping their leadership (lifespan approach). They reported their LFEs to a small peer group by way of drawings and narration. Their peers then inquired into their descriptions, providing a reflective space for life-story elements to surface.

In the second data collection episode, with another 11 participants, the process of LFE collection was followed by a sensemaking exercise during which the cohort piloted a guided sensemaking process. This sensemaking process caused some shifts in participants' perceptions and insight about their learning. In particular, they were asked whether in retrospect, the three LFEs they had chosen at the start of the activity were still relevant to them. Another sub-set of the cohort was assigned multiple meaning-making tasks in which they had to generate alternative 'sides' to their stories from multiple perspectives and to multiple peers.

At the third data collection episode with 33 participants, the initial eliciting and sharing of stories was coupled with a double feedback methodology integrating a combination of peer and facilitator feedback. This allowed for more spontaneous reflection from participants about past learning and which lessons needed to be taken into the future. This type of dialogue allowed for a more in-depth understanding of the significance participants ascribed to their formative experiences and how these could be used to facilitate leadership development in others.

## Results

A total of 66 participants taking part in the study contributed a total of 198 LFEs that were discussed in peer groups, recorded, transcribed and analysed as below.

### Accessing learning

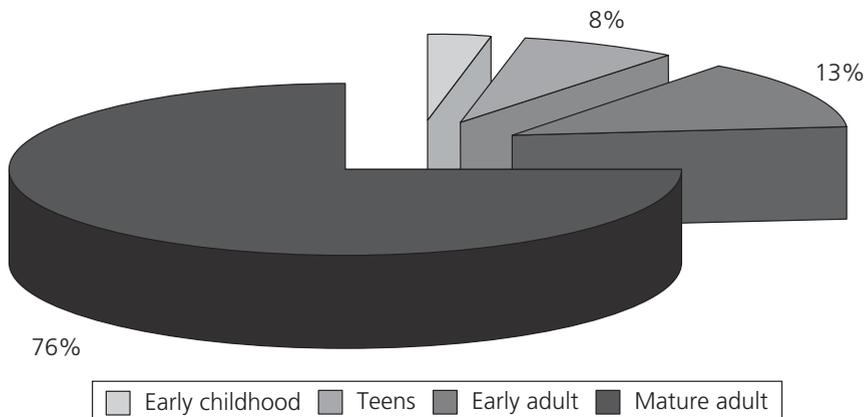
Stories from the first intervention (and hence called first data collection episode) were coded to extract four types of information: age at which the formative experience was reported to have happened and the perspective from which participants were telling their stories. The ages at which experience occurred were coded as early childhood (up to 11 years), teens (from 12 and up to 19 years old), early adulthood (20–30 years) and mature adulthood (31 years and older).

### Accessing learning

The question of what formative timeframe LFEs are recorded from and used in recall is central to building leadership development interventions. As mentioned earlier, both life-span and life-stories approaches build theory on leaders learning from their past experience, but neither approach mentions more specifically the past time frame during which these experiences are recalled most potently.

Figure 1 shows the distribution of the age factor for all LFEs. While some recorded learning experiences rooted in childhood, most were reported from early adulthood on. Figure 1 shows that the further back in time the event goes, the less accessible it is. Most (76%) of LFEs were reported at a time when the participant was older than 31 years of age. This does not necessarily mean that significant experiences do not go back to early childhood or undermine the importance of early experiences; it means that these early experiences or the connection between early and late experience are not easily accessible. If indeed there is a strong connection between past and present experience, then the potential learning is not used effectively by participants.

**Figure 1** Age at which reported LFE occurred



Hence, though antecedents of leadership rooted in early childhood necessarily impact on leadership capabilities and leaders' motivation, how formative experiences from childhood are translated into adult leadership knowledge is unclear, because so much of these processes are not conscious. Processing memories of such experiences in peer groups engaged in sense making and through individual reflection, however, may help participants resurface some of this material, perhaps counteracting the effect of possible recency bias.

The process of remembering and processing itself mattered to participants who later reported a deepening of insight during the exercise. Lessons from the past had not seemingly been extracted naturally entirely to deliver full value to their owner. A common occurrence was for participants to re-evaluate their initial choice of LFE in the weeks following the exercise (in online forums where participants interact and further their conversations about their learning) and put forward a different one – one that was more meaningful for them. This raises interesting questions about the accessibility of learning from formative experiences. Since we hold all our past learning in memory, why are these experiences not easily accessed? This was voiced by one participant as follows: 'Common sense has it that we can access our experience quota easily to draw upon it when needed . . . how is it that the first three experiences that I allocated to this process were actually, in retrospect, not so relevant or significant as I thought first?' (149; 82). Perhaps this change of judgement about which LFEs are deemed significant has to do with the deepening of insight that occurs through the inquiry process, with inquiry helping raise certain issues to more conscious levels.

### **The focus of leadership formative experiences**

The perspectives from which LFEs were coded were *Self* (when the story's principal focus was the participant), *Relational* (when it was the communication or relationship that made a difference to the learning) or *Context* (when the focus was on network or process building within the organization, change of job, impact on society or country). Since our aim is to facilitate new ways of learning within leadership development, our attention turned to the different foci of leadership learning. Three types of perspective were coded for: (1) *Self* (e.g. making a decision to leave work to further studies); (2) *Relational* (e.g. joining a new team and getting used to members' interactions); and (3) *Context* (e.g. working in a very different culture).

The results showed that the focus of LFE stories can be found in somewhat similar proportions across the three types of foci – self (25%), interactions with others (39%) and work contexts (36%). While approximately 60 per cent of participants had undergone a formal leadership activity of one type or another (workshops, short courses, professional development etc), only 5 out of all 198 stories chosen as LFEs related to leadership development training or formal learning events! One described an MBA course and the other four described self-development courses as having made a lasting impact on their leadership.

### **Sensemaking around sources of learning**

Data from the second collection episode was coded using the four factors as in the first collection episode and in addition coded for how the participants made sense of their formative experiences in a leadership context. The results of this analysis

uncovered an array of elements that were deemed formative in the leadership development stories. These elements can be organized in the following six main themes: natural process, coping with difficulties, self-improvement, alignment with a cause, relationship with real or symbolic parent and role model story. Results below include the description of events characteristics as well as classification of meanings as ascribed to leadership formative experiences. Table 1 summarizes organizing principles used to code for the stories after the second coding.

Participants were being asked to select past experiences deemed as formative in retrospect. Some experiences, however, were not necessarily viewed as formative at the time – some of them retrospectively became integrated within an individual's own leadership development pathway, as in the example of a self-improvement experience narrated below:

[The LFE activity] was a really interesting exercise for me, because what kept coming up for me was (an event which I thought at first did not have) anything to do with leadership. Because I certainly didn't, around that time, get into any leadership roles or anything . . . (I made the choice to make a public address) I remember standing up and speaking to the audience. And it was the first time I'd ever really done that, public speaking . . . And people were just like in fits of laughter. It was the first time that I'd spoken in public and really got to make people laugh . . .

And [the effect] on my leadership was knowing that I have an impact on people and they respond to me. Up until that time I had always kind of had myself as being kind of invisible. That was the theory I had. And that sort of really stood out as a significant event, which I hadn't thought about much actually. (137; 14)

**Table 1** *Sensemaking types of leadership formative experiences*

Story sensemaking	Principle and examples
'Natural process'	Subjects must have naturally or without conscious effort taken leadership or had leadership thrust upon them, often for reasons they were unsure of (e.g. individual naturally takes charge as a child when self and older cousins get lost).
Coping and struggle	Must have included some element of adversity (e.g. dealing with a difficult boss).
Self-improvement	Included some element of striving to challenge oneself (and/or challenge but not adversity, except in slight degree, e.g. taking time out for mid-life academic study to fulfil dream).
Alignment with a cause	Showed evidence of being partly driven by serving a particular cause (e.g. indigenous empowerment).
Relationship with (real or symbolic) parents	Included instances where the relationship with parents was prominent in the formative experience described (e.g. wanting to prove to his mother that he would amount to something unlike his father).
Role models	For instances where <i>one or more role models</i> was prominent in the formative experience described (e.g. subject was developed by admired leaders).

One participant related an experience that deals with ‘overcoming adversity’ in the following way:

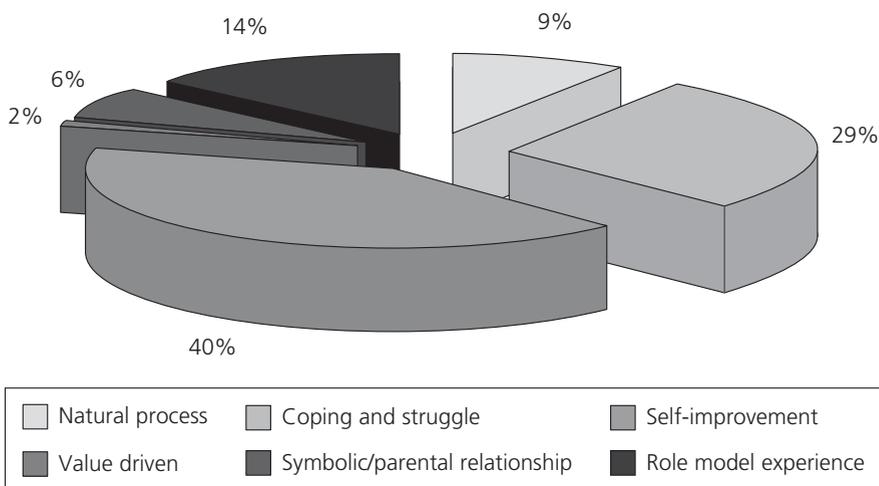
I was 12 when I broke my neck and was rushed to hospital to be hospitalized for three months in traction. The doctor told my parents I’d never walk again, but they never told me. One day I got so sick of having pins and pans put under me that I pulled myself out of bed and borrowing the walking frame from the guy in the bed next to mine I walked myself to the bathroom. It seemed the whole hospital came to a standstill with all doctors and nurses standing back gaping at me. I remember thinking at the time that they were so useless, they didn’t even help me. And only when I got to the toilet did one of the nurses come up to me and gave me a big hug. Then she told me she thought I’d never walk again. It was the only time I saw my father cry in my whole life – when the nurses told him. That taught me one of the basic lessons of life – it is not really what you don’t know, it is what you do know that stops a lot of people from becoming who they want to be in life. If they had told me that I was never going to walk, I am convinced that I never would have walked. I just never knew that I wasn’t supposed to. So every time I do something from now on, and it looks like a challenge, I say to myself, ‘this is like the walk to the toilet’. (1; 7)

Figure 2 shows the percentage distribution of the first LFE recorded as organized by the six sensemaking themes. The figure includes percentages of the categories.

A chi square analysis of the above data ( $\chi^2 = 45.27$ ,  $df = 5$ ) shows that the groups are significantly different from each other (Table 2). A standardized residual test further showed that the effect is being carried by the self-improvement cell ( $p < .01$ ).

All in all, these trends were reinforced for the whole sample; the largest sensemaking category was ‘self-improvement’ (40%), followed by ‘coping with struggle’ (33%), ‘personal relationship/role model’ (13%) and symbolic/parental relationship (5%). These findings generally show that participants’ self-improvement motives are strongly embedded in their experience.

**Figure 2** *First leadership formative experience sensemaking*



**Table 2** *Distribution of the first leadership formative experience according to sensemaking categories*

	Natural process	Coping/struggle	Self-improvement	Value driven	Symbolic/parental relationship	Role model
LFE1	6	19	27	1	4	9

Some stories (8%) supported the ‘born’ leader assertion. A ‘born’ leader example story was one in which a participant described taking charge naturally after self and older cousins got lost.

Only 1 per cent of all LFE stories were related to an alignment with a cause. One example of a value-based experience was an account of how a participant led a failing indigenous organization to a turn-around whose subsequent success was held as an example of how this population could, in effect, self-manage and thrive.

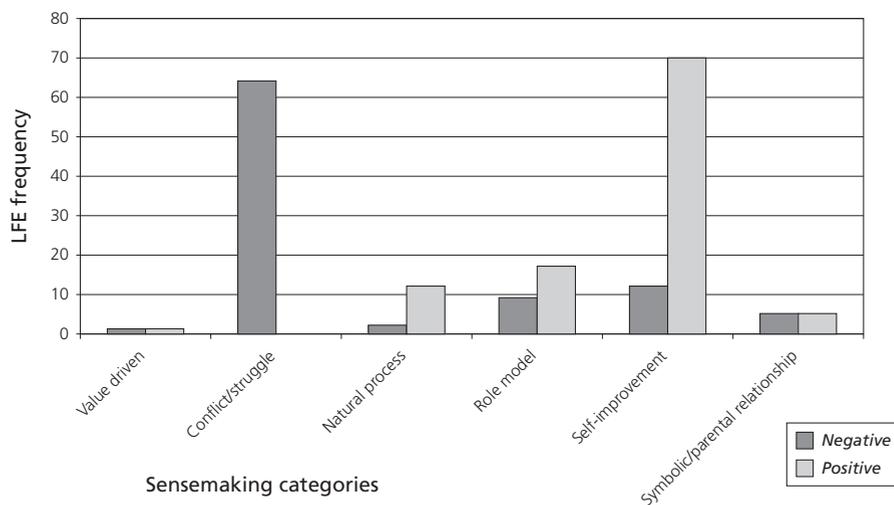
### The emotional valence of learning experiences

The events described in the recorded formative experiences were slightly more positively (52.5%) than negatively (47.5%) charged, however the emotional valence difference alone did not yield significance. The fact that participants recalled as many stories charged with positive or negative valence is an interesting one in itself – almost as though these accounted for two different sides of the same coin of socially constructed ‘common sense’ (Rubin & Bernsten, 2003). This might mean that these events do not carry specific emotional valence of their own, as exemplified in the following quote from one participant, but rather carry the potential of being interpreted or emotionally charged either way:

As I look back on the experiences I chose as formative, I now reflect on what their meaning was as I felt then and as I feel now . . . in some ways, the feelings attached to them impact on me before the events themselves because I do not think about these experiences in a conscious way day to day – I just go through my day acting and reacting in certain ways to certain other happenings. It is only when I look beyond daily events and reflect about why I acted a certain way at a certain time that that I recognize the emotions attached to them in past and present, and it also sometimes feels that opposite emotions could be attached to the same events . . . because the events themselves did not have a value as such before I decided. (17; 89)

Figure 3 represents the distribution of all LFEs according to their emotional valences. Though no stories of conflict and struggle were weighted positively by participants, some other stories received negative emotional charge as told by them.

The values used to draw the graph are presented in Table 3 (bold font). The expected frequencies (adjacent to the observed values in parentheses in Table 3) were calculated and adjusted for the  $2 \times 3$  cells towards chi square analysis. These results allow us to reject the null hypothesis of no difference between the cells. The Cramer’s *V* indicates a strong relationship between emotional valence and sensemaking categories.

**Figure 3** Sensemaking per emotional valence**Table 3** Emotional valence as distributed according to sensemaking categories. Observed (expected) values displayed in bold

	Natural process	Conflict/struggle	Self-Improvement	Value driven	Symbolic/relationship	Role parental	Totals model
Negative	<b>2</b> (6.57)	<b>64</b> (30.06)	<b>12</b> (38.51)	<b>1</b> (0.93)	<b>5</b> (4.69)	<b>9</b> (4.69)	93
Positive	<b>12</b> (7.43)	<b>0</b> (33.94)	<b>70</b> (43.49)	<b>1</b> (1.07)	<b>5</b> (5.31)	<b>17</b> (5.31)	105
Totals	14	64	82	2	10	26	198

Note. Expected frequencies analysis; Pearson Chi-square: 114.321;  $df = 5$ ;  $p = 0.000$ ;  $\Phi = .759$ ; Contingency coefficient = .60; Cramer's  $V = .75$ .

### The social construction of formative experience story telling

Following is an account of a LFE regarding a self-development course being shared with a peer partner. The (abridged) dialogue that took place shows how both story teller and story listener account for shifts of understanding in the process:

A: It was a three-day event at the time . . . I was able to look at my own life and see how much, all the things that happened in my past, my upbringing, my school, my culture, society, all those things, how much they'd influenced who I was at that time . . . and how much that influence was actually out of . . . me. How much I could see myself as being a quiet person who drank too much alcohol. And I was able to get a huge sense of relief and freedom . . . knowing that it was okay and also knowing that there was a way beyond some of the scripting that had had me believe who I was at the time. There was a choice, I could make choices in my life and it just gave me a huge opening to be me . . . what you learn . . . is how much your internal dialogue has a say in what you do and what you don't do . . . And a lot of my self dialogue, mine in a speech, or

whatever I'm doing, was about how I wasn't good enough to do the things I wanted to do. And how I was too scared of what other people might think of me, to do some things that I thought would be really good to do.

I realized . . . I was just doing [certain activities] because I was too scared to do something that might look bad in other people's eyes . . . and because I didn't feel good about myself in the first place. (I made a strategic decision about my organization and gave myself two years to accomplish it) . . . that was one of the things I never would have done unless I had gone to [this course]. So [acting upon my decision] made a huge affect on my ability to lead, my effectiveness in leading.

*B:* Strange that, because [your family] is known throughout the [community] as a foundation family and respected throughout the community . . . over the years, I've thought of you as . . . a leader . . . and a confident person, someone that's confident in themselves and someone to look up to, you know, [so it is] interesting that you mention that.

*A:* [The course made me realize how] we buy in and we do things out of looking good and . . . when you really get to see that . . . which I did at the course, you're able to make a choice about these things afterwards. You're going about your normal day-to-day living, you don't see it as clearly. You don't, you're not aware of it, it's in the background. Why did I do that and just a huge light bulb coming on and thinking whoa, you know, I am okay, you know . . . I thought I was broken mate, I thought there was something wrong with me, but . . . it just gave me this whole physical whoa, you know.

*B:* What made you go to this?

*A:* I'd always been interested in this whole leadership type thing, right, I don't know why that is. And I guess I'd always enquired about it. I'd always thought there's got to be more and we all went together [with others in the community]. And we rang them up and said we're going to this forum and off we went. I [attended follow-up meetings] once a month.

*B:* So it's grown since you've come away from the [original course]?

*A:* Oh yeah, it's made such a difference. I'd like everyone to have the opportunity of looking at it and deciding for themselves. (106; 49)

This peer sharing procedure allows for 'sense sharing' of LFEs in ways that let others understand the experience a leader learnt from. It relates the dialogue whereby participants discuss in peer groups how an LFE contributed to a significant change in the story teller's life.

## Discussion

In terms of accessibility of learning from early leadership experiences, our results partially support a theory of psychosocial development (Erikson, 1950) that highlights young adulthood as a critical period towards identity formation. This might privilege recall of experiences from this time period (Rubin & Bernsten, 2003).

According to Popper (2002) and Kets de Vries (1993, 1996) however, vital information from earlier times does underlie learning, so the question as to why it is not recalled requires further research.

Much of the discussion on the antecedents of leadership is rooted in early childhood and revolves around leaders' psychology (Campbell, 2005; Collins & Moore, 1970; Hennig & Jardim, 1976). Understanding the role of parent-child relationships and childhood experiences helps us to understand both the emergence of leadership capabilities in leaders and leaders' motivation (Aaltio-Marjosola & Jyri, 1998; Jørstad, 1996).

Popper (2002) analysed biographies and psycho-biographies of leaders utilizing attachment styles to reflect variability in childhood experience and he proposed attachment theory (with its focus on who the attachment figure is, how it is expected to respond and accept the self) provided a theoretical foundation from which to explore individual differences in implicit leadership theories. He contended that these experiences may shape expectations about the self in relation to leadership figures as well as willingness to learn or change behaviour consistent with different leadership models and understanding of their impact on followers. Popper and Mayseless (2003) and Keller (2003) further developed the comparison between the developmental processes that underlie the relationship between transformational leaders and their followers and parents and their children. They argue that comparable dynamics support motivation, empowerment and morality mechanisms in these relationships, but that much of these processes do not operate in a conscious manner. Kets de Vries (1992, 1996) drew further connections between early personality development and leadership styles, with particular reference to the development of the self within a psychoanalytical framework. In case studies of leaders, he contended that for reasons buried in their 'inner theatre', some leaders find it very hard to adjust to changes in the external environment and used the psychoanalytic object relations theory to analyse how childhood experiences can provide explanations for leader actions.

For Avolio and Luthans (2005), the identification of 'trigger moments' plays an important role in raising awareness during leadership development. This research raises the problem of how to identify moments that may have a 'delayed trigger' effect whereby there is a significant time lag (which may be decades) between the formative experience and the recognition of its importance. It may be that an event or reflection calls on a 'delayed trigger' effect and there may be a 'tipping point' in terms of strength or frequency of a development intervention formative experience where the formative 'content' attains critical mass and reaches into awareness.

- *Proposition 1a:* Lessons from the past do not get processed 'spontaneously' to deliver value.
- *Proposition 1b:* It is possible to design settings that help extract learning from early formative experiences to deliver higher value.

A surprising 1 per cent of all stories related to value-driven experiences. This result does not necessarily mean that participants did not remember any value-based experiences but it may be that the significance of these experiences has not been recognized, processed or articulated as having contributed to their leadership development yet (see Proposition 1a). Given that values are a fundamental part of the

practice and apprenticeship of leadership (Shamir et al., 2005), and that value-based experiences are strongly related to openness to feedback between leaders and followers thereby playing a substantial role in follower development (Lipshitz et al., 2007), its potential as one storytelling element cannot be understated.

The distribution of the LFE sensemaking themes supports the theory that leadership development participants are on a journey guided by self-improvement – or perhaps on a pathway to becoming extraordinary (Morgan et al., 2005). These findings are consistent with the argument put out by Shamir et al. (1994), that leaders' stories and rhetoric are key to understanding their motivation and behaviour, since: (a) people are motivated to maintain and enhance their self-esteem and self-worth, and (b) people are also motivated to retain and increase their sense of self-consistency. Thus, if certain 'developmental stories' become explicit, they are likely to guide the teller's 'theories of action' (Argyris, 1993), including his or her self-development. Sense making can help the process of making such material become explicit.

- *Proposition 2:* Sensemaking can help articulate lessons from experience because it is strongly embedded in experience.

Building on Kempster's (2006: 16) conclusions that formative stories point to 'underlying causal influences on leadership learning', this research also pointed to time-related differential recovery points and a balance in emotional valence attached to the learning experiences.

Leadership formative experiences displayed similar characteristics to some real-life narratives described (Rubin & Bernsten, 2003), including events that were both positively and negatively charged. These authors theorize the existence of culturally shared life scripts that appear at transition points and follow similar cultural patterns. Rubin and Bernsten (2003) empirically demonstrated that life scripts register a 'reminiscence bump' for positive but not negative events as recorded by individuals. What our data add to this debate is the fact that self-improvement experiences, whether negatively or positively charged, are first remembered. Further cross-cultural comparisons are needed to establish if such cultural script elements are at work in significant leadership experiences, or if they impact on the emotional valence attached to these in any way.

- *Proposition 3:* Emotional valence impacts on the sensemaking process, for instance, self-improvement experiences are related to positive valence and conflict and struggle experiences are related to negative valence.

Because of the potential impact of emotional valence, however, we suggest that future research into LFE investigate how emotional valence gets connected to experience concurrently with tacit knowledge building (Janson & McQueen, forthcoming). In particular, if participants could evaluate degrees of emotional valence, as opposed to simply looking at it in a duality (positive/negative), this would allow for the exploration of the relationship between emotional valence, sense making and context-related perspective. With regards to the latter, our results show that formative stories were told from approximately equally distributed perspectives, focusing on self, others and work context. This is generally consistent with Bryman's (2004) assertion that leadership development involves both a process and the context in

which it occurs. This constitutes one step towards validating leadership development models that include content from all three domains, as opposed to those who focus on some and exclude others. Lind and Sitkin's model of leadership development, for instance (Sitkin et al., 2005; Sitkin & Lind, 2006) include these three arenas within the intra-group relationships following from group belonging and structure and consider personal, relational and contextual leadership as the three foundation building blocks of their pyramidal model of leadership development. It also provides further validation of leadership development processes that include content and experiences from all three domains. It is likely that the impact of leadership development is increased as it includes more areas that are significant to participants (Hernez-Broome & Hughes, 2004; Hubbard, 2005).

- *Proposition 4a:* Leadership formative experiences are rooted in one of self, relational or contextual dynamics.
- *Proposition 4b:* Leadership development programmes do not necessarily leave traces strong enough to get processed as formative experiences of leadership.

Given the potential learning value of these experiences, leadership development programmes need to take these three perspectives into consideration. This does not necessarily happen, given the increasing number of leadership development programmes that advertise themselves as 'self-development' as opposed to focusing on all three perspectives.

Our intervention outlined the social construction of formative experiences in a leadership context. The contents of an LFE are detailed above as the only story told about a formal self-development workshop. If Popper and Maysel's (2003) assertion that transformational leaders may play a crucial role in initiating or maintaining corrective processes, then it might be in such micro-interactions that traces of this activity will be found. Popper and Maysel's interpretation of this effect is that transformational leaders provide attachment figures for their followers thereby providing the secure base and caregiving functions. In doing so, transformational leaders present followers with an alternative worldview, which the latter might adopt, thus facilitating or strengthening a change that might have originated in another context.

Storytelling may be one vehicle to connect past, present and future contexts (Boal & Schultz, 2005) for leadership formative experiences, as in the examples described earlier. Much literature describes the impact of these stories on followers (Sparrowe, 2005). Our intervention utilized leadership formative experiences as mediating objects for dialogue, much as Palus et al. (2003) use images. Following these authors' method, personal narratives (the building blocks of personal identity work) were used in shared sense making to bridge between individual and group work. When participants were encouraged to 'flesh out' their original stories in various group contexts, enhanced versions of the stories were produced with each iteration, allowing them to hold a growing number of perspectives and experience greater ease at eliciting interest with different interlocutors. This is relevant because leaders' formative experiences are relayed to followers and/or researchers through storytelling, and help develop leadership authenticity. Although the impact of storytelling activity is widely

recognized as leadership building, not all leaders are natural storytellers (Denning, 2001; Ready, 2002). An LFE-based intervention can help leaders build storytelling capacity through shared sense making, reinforcing Parry and Hansen's (2007) assertion that 'the story is the leader'.

- *Proposition 5a*: Shared sense making can build one's story telling's ability thus assisting with the social construction and validation of leadership formative experiences.
- *Proposition 5b*: Leadership development can act as a laboratory to promote the types of micro-interactions that grow participants' ability to learn to tell their stories and those of their organizations.

## Limitations of the study

There are a number of limitations affecting the scope of these findings. First, interviewees were all participants in leadership development programmes hence represent a subset of leaders. Future studies should include a wider base of participants. Second, interviewees were confined to a small sample. A larger sample would add more statistical significance to the results. In particular, a larger and more diverse sample would allow for closer investigation of the age factor, as it is likely that results suffer from historical leniency, and it is possible that younger participants may recall more leadership formative experiences from earlier periods in their lives. Third, as noted earlier, a possible recency bias needs further investigation. Such recency bias may have influenced choices of LFEs from more recent events from participants' lives, hence early experience may be more important than suggested by our data. In doing so, it may be possible to shed light on and test methodologies that allow participants to access more fully these early experiences. For example, it could allow us to validate our suggestion that peer discussion can act as a vehicle to surfacing earlier formative experiences. Fourth, the research was carried out in one country, albeit one with different cultural contexts. In accordance with Bhagat et al. (2002) learning is influenced by cultural context, hence wider cross-cultural comparisons would allow for the design of more effective interventions in different contexts. This would increase the robustness of the findings and build an understanding of the commonalities and differences in leadership formative experiences across societies.

## Conclusion

The discipline of leadership development is interested in leaders developing accelerated methods to increase processing and learning from leadership formative experiences for at least three reasons: (a) to help their own leadership development, which in turn will (b) assist them in their development of future generation of leaders. The third reason for our interest in LFEs is to help shape our understanding of how to craft formative experiences for use in programmes constructed to effect change.

By experimenting with using LFEs for reflection, interpersonal communication, trust building and change, leaders gain a renewed understanding of the meaning of past elements in their present leadership and a deeper level of insight from past experiences (Janson & McQueen, forthcoming). By using LFEs as a platform for

discussion during leadership development, we developed a means for leaders to understand the mechanisms by which they ascribe meaning to these experiences which in turn impacts on how they learn from them. Once they grasp these mechanisms, they can make other past (and current) experiences more accessible to their own leadership development and that of others. Hence, LFEs used this way may have the capacity to accelerate leadership development by charging more conversations with emotional valence that impact on the self and others.

By building storytelling capability, leaders can integrate past elements of their experience into new learning. We carried out this activity using peer discussions which represents a leader–leader (rather than leader–follower) relationship. In this context, roles become interchangeable and one assumes either the position of storyteller or that of ‘story listener’. This process facilitated meaning sharing in the cohorts. This provided good practice for further use of LFE competencies when participants go back into their organisational and leader–follower contexts.

Another crucial finding was that only 5 out of 198 LFE concerned formal leadership development courses or workshops. What we learn as leadership development practitioners is that our participants do not necessarily know how to articulate the learning that happens during the development intervention – and if this is the case, perhaps part of the development should be devoted to learning how to articulate what is learnt and how it can be carried into the future with sufficient clarity and weight that it can be easily accessible.

Additionally, development courses may have a ‘delayed trigger’ effect whereby there is a significant time lag (which may be decades) between the development intervention and action based on learning from it. Additionally, there may be a ‘tipping’ impact mechanism for it to reach into awareness. In other words, a one-off intervention may have limited impact but an ongoing and sustained leadership development programme may be more successful in ‘shaping’ formative experiences, especially if they involve building a reflective practice.

The primary conclusions of this research are that leadership formative experiences carry within themselves the potential to become more specific and conscious learning tools. By encouraging reflection and discussion on a LFE, it encourages further sense making of the experience for leadership development. Equally, reflecting on and discussing experiences (using sense sharing) could be a formative experience in itself. That is, perhaps the most powerful impact of such experiences lie precisely in the fact that they are vessels into which significance can be poured and carried to far away destinations with relevance in many leadership contexts. Such interpretation may explain participants’ reporting of learning from as many positive as negative experiences. As such, one key take away message that these findings convey is the large extent to which Leadership Learning material may lay dormant within leader candidates and the potential – equally underused – of leadership development programmes to tap into this rich material.

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